Transforming behavioral health: Seamless patient intake for operational excellence

The background

In the pediatric behavioral healthcare sector, our client provides personalized ABA therapy for children with autism. They faced significant challenges, including long waiting lists for therapy services. Their current EMR platform lacked a streamlined patient intake feature and posed integration issues due to its closed architecture

With 34+ clinics across the U.S, the client is on growth trajectory. Addressing these operational hurdles was vital to support their ambitious plans and ensure timely access to care for their patients.

The client relied on Google Sheets for patient intake, which offered limited reporting capabilities and required manual data aggregation, complicating the generation of actionable insights.

To address these issues, the client sought to develop a tailored intake platform for ABA therapy and behavioral health that would streamline the process, enhance collaboration between users and patients, and improve patient progress monitoring. The objective was to create a comprehensive platform that optimizes workflows and enhances care delivery for pediatric behavioral health patients, thus reducing waiting times and improving service quality.

The Consulting Approach

~5 Day In-depth workshop	**~15 Processes discovered & analyzed**	**Prioritized matrix based software requirements**	**Envisioned user roles defined**
10 Business and technical knowledge acquisition sessions	End-to-end intake process walkthroughs highlighting critical needs and expectations	Created a product road map and defined the with MVP	Internal user journey maps with role- and persona-based requirements

Workshop goals

- The client partnered with CitiusTech to design and develop an automated patient intake software.

- Elaborate and prioritize the intake software requirements and use cases.

- Develop a functional & technology architecture.

- Evaluate and recommend the technology options.

- Provide a solution implementation and rollout plan with high-level budgets for Release I and II.

Our approach and outcomes

- Conducted pre-workshop engagement with the leadership team to understand business strategy

- Held key stakeholder interviews and group discussions to assess solution requirements

- Walked through the end-to-end intake process, identifying critical needs and expectations

- Discussed technical preferences and requirements, followed by a high-level feasibility analysis

- Delivered a patient intake software development proposal, including timelines and effort estimates

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The Solution

In 2023, CitiusTech started building software that drives patient intake efficiency by reducing reliance on disparate information sources and promoting data-driven decision-making.

- ■ 2+ years of engagement powered by User Adoption & Design Led Engineering

- ■ Automation of daily tasks improves operational efficiency by minimizing data errors and associated costs

- ■ Reduced patient processing time from hours to minutes with a simplified application and standardized processes

- ■ Faster onboarding of intake users supports business expansion and growth

- ■ Intake users can monitor the patient journey, milestones, and updates to identify roadblocks

- ■ A unified platform fosters collaboration among internal users and patients, leading to better health outcomes

- ■ 360 degree view of patient data across the organization accompanied by data aggregation to derive insights

Dashboards
Summary view for every user role including KPI count and follow-up due dates

Role-based access
Secure pathways according to patient assignments and clinical responsibilities

Workflow automation
Seamless patient movement through the intake journey and real-time status updates

Integration with Docusign
Accelerated document exchange with patients via DocuSign as per business needs

Notifications and reminders
Customized notifications and reminders for patient tracking across the care journey with hyperlinks

Intake performance chart
View performance based KPIs and activities done across last month/ last quarter/ last year

Impact

Our collaboration tackled the client's operational inefficiencies and enabled a seamless transition to digital transformation, driving enhanced productivity and streamlined processes.

- A cloud-based, flexible, and scalable platform with integrated data lakes to ensure the availability of patient data.

- Intake users can view the patient's journey, milestones, real-time status updates, and document exchanges to identify roadblocks.

- A centralized document repository to securely store medical records.

- Advanced analytics to visualize staff performance by providing a consolidated view of key performance indicators (KPIs). Power BI-based dashboards will visualize key growth metrics, enabling real-time insights and improved decision-making for leadership.

- A communication center for intake users, clinicians, and patients to facilitate seamless patient movement across the care pathway.

- An enterprise scale intake app that can operate across centers spread over the US and enable growth.

- Met the clinical and operational needs, enabling rapid deployment to empower digital transformation and design a healthier future for patients

Thank you

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